

SIMULATION IN MOTION MONTANA, INC.

REQUEST FOR PROPOSAL (RFP)

RFP Title: Montana Simulation in Motion

RFP Response Due Date and Time:
April 21, 2017
2:00 p.m., Mountain Time

Number of Pages:
Twenty-three (23)

Issue Date:
March 24, 2017

MOBILESIM MONTANA INFORMATION

RFP Contact:
 Bonnie Lorang
MobileSim Project
Montana Medical Association
Phone: (406) 443-4000
Fax: (406) 443-4042

Return Sealed Proposal to:
 Montana MobileSim
 Montana Medical Association
 2021 Eleventh Avenue, Suite 1
 Helena MT 59601-4890

PROJECT MANAGEMENT ENTITY (PME) MUST COMPLETE THE FOLLOWING

PME Name/Address:

(Name/Title)

(Signature)

Print name and title and sign in ink. By submitting a response to this RFP, PME acknowledges it understands and will comply with the RFP specifications and requirements.

PME Phone Number:

PME E-mail Address:

PME FAX Number:

PROSPECTIVE PME MUST RETURN THIS COVER SHEET WITH RFP RESPONSE

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INSTRUCTIONS TO PROSPECTIVE PME

It is the responsibility of each PME to:

Follow the format required in the RFP when preparing your response. Provide responses in a clear and concise manner.

Provide complete answers/descriptions. Read and answer **all** questions and requirements. Proposals are evaluated based **solely** on the information and materials provided in your written response.

Use any forms provided, e.g., cover page, etc.

Submit your response on time. Note all the dates and times listed in the Schedule of Events and within the document. Late proposals are **never** accepted.

SCHEDULE OF EVENTS

<u>EVENT</u>	<u>DATE</u>
RFP Issue Date.....	March 24, 2017
Pre-Proposal Conference (Optional).....	April 7, 2017
RFP Response Due Date.....	April 21, 2017
Notification of PME Interviews (Optional).....	April 28, 2017*
Offeror Interviews (Optional)	May 5, 2017*
Intended Date for Contract Award (Optional).....	May 19, 2017*

***The dates above identified by an asterisk are included for planning purposes. These dates are subject to change.**

SECTION 1: INTRODUCTION AND INSTRUCTIONS

1.1 INTRODUCTION

MobileSim Montana is a non-profit corporation formed specifically to support a mobile simulation project funded by the Helmsley Charitable Trust to the Department of Public and Human Services. While the EMS and Trauma Systems Section of DPHHS is the recipient of these grant funds and is the entity responsible for grant deliverables and reporting, ongoing operations, governance and sustainability planning is being shifted to the corporation. The next key activity is for MobileSim Montana to secure a contract with a Project Management Entity (PME) to provide the day-to-day provision of mobile simulation education including hiring of educators, maintaining the vehicles and manikins, scheduling and other support the board requires.

MobileSim Montana now seeks proposals to provide these project management, education and sustainability activities. The desired project management entity will be an organization capable of performing required education and evaluation activities as well as be flexible to future project challenges and needs. Similar mobile simulation projects have been ongoing in North and South Dakota for several years. Montana's project startup and sustainability will require a PME interested in being an active, advisory partner to the MobileSim board.

Definitions:

MobileSim Montana represents a unique, public-private partnership and opportunity with private funds for startup and implementation over the next three years and sustainability beyond grant support. For the purposes of clarity, the following terms are being used in this RFP:

- Simulation in Motion Montana, Inc. – also dba MobileSim Montana. This 501(c)3 non-profit, formed as one of the grant objectives, is the entity to assist EMSTS/DPHHS with administration of the grant. Montana's grant proposes that overall governance and long-term planning of this project be shifted to this entity as appropriate.
- EMSTS/DPHHS – The EMS and Trauma Systems Section, Montana Department of Public Health and Human Services. EMSTS is the recipient of the Helmsley Charitable Trust funds and has overall responsibility for administration of the grant and performance of grant objectives.

1.2 CONTRACT PERIOD

The initial contract period is three years with annual renewals. The parties may mutually agree to a renewal of this contract in one-year intervals, or any interval that is advantageous to MobileSim Montana.

1.3 SINGLE POINT OF CONTACT

From the date this Request for Proposal (RFP) is issued until a PME is selected and announced, **prospective PMEs shall not communicate with MobileSim board directors or EMSTS staff regarding this procurement, except at the direction of Bonnie Lorang**, the RFP contact person in charge of the solicitation. Any unauthorized contact may disqualify the prospective PME from further consideration. Contact information for the single point of contact is:

RFP Contact Person: **Bonnie Lorang**
Telephone Number: **(406) 443-4000**
Fax Number: **(406) 443-4042**
E-mail Address: **mma@mmaoffice.org**

1.4 REQUIRED REVIEW

1.4.1 Review RFP. Prospective PME's shall carefully review the entire RFP and shall promptly notify the RFP contact person identified above via e-mail or in writing of any ambiguity, inconsistency, unduly restrictive specifications, or error that they discover. In this notice, the PME shall include any terms or requirements within the RFP that preclude the PME from responding or add unnecessary cost. Prospective PME's shall provide an explanation with suggested modifications. The notice must be received by the deadline for receipt of inquiries set forth in Section 1.4.2. MobileSim Montana will determine any changes to the RFP.

1.4.2 Form of Questions. Prospective PME's having questions or requiring clarification or interpretation of any section within this RFP must address these issues via e-mail or in writing to the RFP contact person listed above on or before April 7. Questions received after the deadline may not be considered.

1.4.3 State's Response. MobileSim Montana will provide a written response by April 12 to all questions received by April 7. MobileSim's response will be posted on EMSTS's website at <http://dphhs.mt.gov/publichealth/EMSTS/MobileSim-Montana/mobilesimrfp> by the close of business on the date listed. Any other form of interpretation, correction, or change to this RFP will not be binding upon MobileSim Montana.

1.5 PRE-PROPOSAL CONFERENCE CALL

An **optional** Pre-Proposal WebEx Call will be conducted on April 7 at 10:00 a.m. Mountain time. Prospective PME's are encouraged to use this opportunity to ask clarifying questions, obtain a better understanding of the project, and to notify MobileSim Montana of any ambiguities, inconsistencies, or errors discovered upon examination of this RFP. All responses to questions during the WebEx Call will be oral and in no way binding on MobileSim Montana. Participation in the Pre-Proposal WebEx Call is optional.

This Pre-Proposal Conference Call has been set up for WebEx access. Following are the instructions for connecting to this meeting:

1. Please join my meeting.
<https://hhsmt.webex.com/hhsmt/j.php?MTID=m8e73451798d403e99b46979082b7b1b9>
2. Use your microphone and speakers (VoIP) - a headset is recommended.
Or, call in using your telephone. Dial (888) 447-7153 – enter user code: 547904
3. Meeting Access Code: montana1

1.6 GENERAL REQUIREMENTS

1.6.1 Terms and Conditions/Contract. Upon selection of a successful PME through this RFP process, MobileSim Montana will negotiate a contract for services. Appendix B lists proposed PME deliverables. MobileSim Montana reserves the right to address nonmaterial requests for exceptions to these and standard terms, conditions and contract language with the highest scoring PME during contract negotiation.

1.6.2 Understanding of Specifications and Requirements. By submitting a response to this RFP, PME acknowledges it understands and shall comply with the RFP specifications and requirements.

1.6.3 Offeror's Signature. PME's proposal must be signed in ink by an individual authorized to legally bind the PME. The PME shall provide proof of authority of the person signing the RFP upon MobileSim's request.

1.6.4 Offer in Effect for 120 Calendar Days. Offeror agrees that it may not modify, withdraw, or cancel its proposal for a 120-day period following the RFP due date or receipt of best and final offer, if required.

1.7 SUBMITTING A PROPOSAL

1.7.1 Organization of Proposal. Prospective PMEs must submit a signed copy of the RFP cover sheet and the form attached as Appendix C to respond to this RFP. Prospective PMEs shall follow the response format outlined in Appendix C: RFP Response Form. Proposals should be bound, and must include tabbed dividers separating each section. Proposal pages must be consecutively numbered.

1.7.2 Failure to Comply with Instructions. Prospective PMEs failing to comply with these instructions may be subject to point deductions. Further, MobileSim Montana may deem a proposal nonresponsive or disqualify it from further consideration if it does not follow the response format, is difficult to read or understand, or is missing requested information.

1.7.3 Multiple Proposals. Prospective PMEs may, at their option, submit multiple proposals. Each proposal shall be evaluated separately.

1.7.4 Copies Required and Deadline for Receipt of Proposals. Prospective PMEs must submit **one original proposal and three (3) copies**. MobileSim Montana reserves the right to request an electronic copy of the RFP response.

EACH PROPOSAL MUST BE SEALED AND LABELED ON THE OUTSIDE OF THE PACKAGE clearly indicating it is in response to the MobileSim RFP. ***Proposals must be received at the reception desk of the Montana Medical Association prior to 2:00 p.m., Mountain Time, April 21, 2017. Prospective PME is solely responsible for assuring delivery to the reception desk by the designated time.***

1.7.5 Facsimile Responses. A facsimile response to an RFP will ONLY be accepted on an exception basis with prior approval of the RFP contact person and only if it is received in its entirety by the specified deadline. Responses to RFPs received after the deadline will not be considered.

1.7.6 Late Proposals. ***Regardless of cause, MobileSim Montana shall not accept late proposals. Such proposals will automatically be disqualified from consideration.***

1.8 COSTS/OWNERSHIP OF MATERIALS

1.8.1 State Not Responsible for Preparation Costs. PME is solely responsible for all costs it incurs prior to contract execution.

1.8.2 Ownership of Timely Submitted Materials. MobileSim Montana shall own all materials submitted in response to this RFP.

SECTION 2: RFP STANDARD INFORMATION

This RFP process is a procurement option allowing the award to be based on stated evaluation criteria. The RFP states the relative importance of all evaluation criteria. MobileSim Montana shall use only the evaluation criteria outlined in this RFP.

2.1 CLASSIFICATION AND EVALUATION OF PROPOSALS

2.1.1 Initial Classification of Proposals as Responsive or Nonresponsive. MobileSim Montana shall initially classify all proposals as either "responsive" or "nonresponsive". MobileSim Montana may deem a proposal nonresponsive if: (1) any of the required information is not provided; (2) the submitted price is found to be excessive or inadequate as measured by the RFP criteria; or (3) the proposal does not meet RFP requirements and specifications. MobileSim Montana may find any proposal to be nonresponsive at any time during the procurement process. If MobileSim deems a proposal nonresponsive, it will not be considered further.

2.1.2 Evaluation of Proposals. An evaluation committee will evaluate all responsive proposals based on stated criteria and recommend an award to the highest scoring PME. The evaluation committee may initiate discussion, negotiation, or a best and final offer. In scoring against stated criteria, the evaluation committee may consider such factors as PME responses and a comparative evaluation of other proposals in terms of differing price and quality. These scores will be used to determine the most advantageous offer to MobileSim Montana.

2.1.3 Opportunity for Oral Presentation and Negotiation. After receipt of proposals and prior to the recommendation of award, the RFP contact person may initiate discussions with one or more Prospective PMEs should clarification or negotiation be necessary. Prospective PMEs may also be required to participate in an interview to clarify their RFP response or to further define their offer. In either case, Prospective PMEs should be prepared to send qualified personnel to Helena, Montana, to discuss technical and contractual aspects of their proposal. Interviews, if requested, shall be at the PME's expense.

2.1.4 Best and Final Offer. MobileSim Montana may request a best and final offer if additional information is required to make a final decision. While unlikely, MobileSim Montana reserves the right to request a best and final offer based on price/cost alone.

2.1.5 Evaluation Committee Recommendation for Contract Award. The MobileSim evaluation committee will adopt on a written recommendation for contract award including a rationale for the decision based upon the scores and other findings.

2.1.6 Contract Execution. Upon completion of scoring and ranking of PME proposals, contract negotiations will be initiated with the highest scoring PME. If the PME does not accept all material requirements, MobileSim Montana may move to the next highest scoring PME, or cancel the RFP. Work under the contract may begin when the contract is signed by all parties.

2.2 MOBILESIM MONTANA'S RIGHTS

While MobileSim Montana has every intention to award a contract resulting from this RFP, issuance of the RFP in no way constitutes a commitment by MobileSim Montana to award and execute a contract. Upon a determination such actions would be in its best interest, MobileSim Montana, in its sole discretion, reserves the right to:

- Cancel or terminate this RFP;
- Reject any or all proposals received in response to this RFP;

- Waive any undesirable, inconsequential, or inconsistent provisions of this RFP that would not have significant impact on any proposal;
- Not award a contract, if it is in MobileSim's best interest not to proceed with contract execution; or
- If awarded, terminate any contract if MobileSim Montana determines adequate funds are not available.

SECTION 3: PROJECT SPECIFICATIONS

MobileSim Montana requests proposals for a Project Management Entity (PME) to assist with the startup and implementation of a statewide Mobile Simulation program for emergency medical services, hospitals and other interested customers and stakeholders.

To enable MobileSim Montana to determine the capabilities of a PME to provide the services specified in this RFP, the prospective PME shall respond to the following sections relative to its ability to meet the MobileSim project requirements.

3.1 INTRODUCTION

3.1.1 Purpose

The purpose of this RFP is to solicit proposals for the purposes of entering into a contract through competitive negotiations for the professional services of a Project Management Entity, authorized to do business in the Montana, with experience in the planning, design and delivery of education, particularly mobile simulation education.

Simulation has the power to radically improve the competency of the healthcare workforce and patient outcomes. The goal of this RFP and award of a PME contract is to combine MobileSim's governance with the expertise of a prospective PME to collaboratively implement and mobile simulation education through the grant period and into the future.

Proposals will be specifically evaluated for their respective alignment to program goals [Relevance], the potential impact on patient and learner outcomes [Impact], and the proposed plan and vision for a sustainable MobileSim project [Approach].

Suggestions for successful proposals include:

- The proposal should reflect the prospective PME's interest in providing simulation education as well as an interest in the long term sustainability of the project within grant and budget restraints
- Proposals should describe how faculty with broad range of expertise, including expertise in curriculum design, quality improvement/patient safety, and outcomes assessment will be utilized.
- The proposal should include an evaluation plan to determine the impact of the funded project on learners, patient outcomes (when appropriate) and overall evaluation of the project.
- The proposal should recognize and acknowledge that the successful PME will need to perform some specific grant related activities as well as be flexible to meet long term sustainability activities that may only be recognized as the project becomes more mature.

All proposals will be reviewed by MobileSim Montana. As funding for this project has already been awarded, MobileSim will be attempting to conduct proposal reviews, interviews and an award as expeditiously as possible.

3.1.2 Background

The Leona M. and Harry B. Helmsley Charitable Trust has been actively engaged with funding several EMS and hospital initiatives to improve the health and lives of Montana citizens. Two EMS/hospital initiatives include an American Heart Association – Mission Lifeline project to improve STEMI 12-lead EKG transmission capability for EMS and hospitals and an EMSTS/DPHHS project to develop Cardiac Ready Communities enhancing the cardiac chain of survival for patients suffering cardiac arrest.

In 2016, the Helmsley Charitable Trust invited Montana to apply for funding to implement Simulation in Motion Montana. This \$4.6 million grant includes the purchase of three mobile simulation training trucks with a suite of high definition simulation manikins. The forward section of these trucks includes pull out areas and simulates an emergency room; the back simulates an ambulance. The manikins are high fidelity computerized training tools that talk, breath, have heartbeats, and can react to medications and other actions of the learners. They can live or die and can be reviewed over and over again.

The primary goal of MobileSim Montana is to provide education and training to rural EMS services and hospitals. As part of a plan to assure sustainability, other stakeholders such as universities, colleges and others who have a need for simulation education could also take advantage of this program. Our research reveals that simulation is becoming ever more important to numerous stakeholders and MobileSim Montana can be of value to organizations and institutions who cannot maintain their own programs.

Helmsley has previously funded mobile simulation projects in both South Dakota (<http://www.sim.sd.gov/>) and North Dakota (<http://www.med.und.edu/sim-nd/>). Now, both Montana and Nebraska have been funded to follow their lead.

Helmsley has funded the purchase of three mobile simulation trucks (app. \$500,000 ea.) and the suite of CAE manikins (app. \$250,000 ea.) They are also funding operations of the program for three years. With an eye to promoting sustainability of the program, Helmsley will provide the project operations at 100% the first year, 66% in year two and 33% in year three.

Pursuant to conversations with the Dakotas and discussions with numerous potential partners, Montana proposed a different implementation model that will help insure a stronger plan for sustainability. While maintaining a core mission to provide education to EMS and hospitals around the state, we also are planning to serve a broader customer base (e.g. universities, schools and others).

Additionally, we have proposed a foundationally different way of managing MobileSim Montana. While both Dakotas rely on hospital systems to manage staff, scheduling of education, maintenance and reports, Montana is proposing that MobileSim Montana be managed by a public/private partnership with the nonprofit corporation and a board of directors overseeing governance of the program. Additionally, corporation membership includes an advisory committee representing key users and stakeholders (EMS, hospitals, universities, colleges, etc.). Such an organizational structure will be positioned better to manage the program over the next three years and to better plan for sustainability beyond that time.

Additional information on the project can be found at:
<http://dphhs.mt.gov/publichealth/EMSTS/mobilesimmontana>.

3.1.3 Simulation in Motion Montana, Inc. – Overview

Simulation in Motion Montana, Inc. is a non-profit corporation formed to operate exclusively for educational and charitable purposes within the meaning of Section 501(c)3 of the Internal Revenue Code. The mission of this corporation is to provide and facilitate educational and other workforce related activities that support increased educational opportunities, health care provider competence and a team approach to delivery of health care.

An advisory group of interested stakeholders has been meeting over the last year to conduct preliminary planning for project startup and operations. Beginning in the fall of 2016, Montana recruited five inaugural directors of Simulation in Motion Montana, Inc. and the corporation has been certified by the Secretary of State. As part of the bylaws structure, the advisory committee is explicitly included as a non-voting entity with direct advisory responsibility to the board of directors.

3.1.4 EMS and Trauma Systems Section – Overview

EMSTS / DPHHS is the state's lead agency responsible for the development of a comprehensive emergency care system for Montanans. It is the vision of EMSTS that the development of comprehensive emergency care programs is imperative to the well-being, health and safety of Montana citizens. The section's overall mission is to reduce death and disability by providing leadership and coordination in the planning and development of a comprehensive, evidence-based emergency care system that measurably prevents and reduces morbidity and mortality. An emergency care system can be characterized as a system of systems. EMSTS is engaged with EMS system planning, EMS service licensing and regulation, trauma system development, EMS for Children, injury prevention, cardiac ready communities and poison control.

3.1.5 Project / Contract Vision

MobileSim Montana is a new project - a model never attempted in Montana on this scale. While similar programs have been ongoing in South Dakota and North Dakota for several years, Montana is proposing a fundamentally different way of governing and implementing its program. While some assumptions and lessons learned can be drawn for the Dakota experiences, new strategies will need to be developed to assure Montana's plan is successful and sustainable. As such, we are seeking not just a PME to manage this project for the three years grant funding, but MobileSim is especially interested in a visionary partner that is also interested in the long-term sustainability of the project.

3.1.6 Project Organization

EMSTS/DPHHS is the recipient and principle investigator of the \$4.6 million grant from the Helmsley Charitable Trust. EMSTS is ultimately responsible for overall management of the grant funds, project deliverables and reports. Simulation in Motion, Inc. will assist EMSTS with planning and implementation of this project. While various administrative aspects of the grant will remain with EMSTS, it is our plan to engage the Simulation in Motion Montana, Inc. with the ongoing planning and administration of the project. This includes the governance of the project through the board of directors and the assistance of the advisory committee consisting of representatives of various stakeholders including EMS, hospitals, colleges, universities and others. As much as possible, it is the corporation that will contract for services such as for PME project management.

3.1.7 Montana's Project Plan

The primary objective of the project is to provide education to EMS and hospitals in rural communities. This is also the primary mission of both programs in the Dakotas. In order to better position itself for long term sustainability, Montana is planning for a broader customer base. Helmsley funding is only available for three years. Continued funding for operations, personnel, repairs and maintenance, marketing, manikin replacement and other costs will be dependent upon customers who value the MobileSim education and services enough to pay for them. Other sources of funding may include grants and corporate sponsors.

3.1.8 Budget Assumptions

A key element of the Helmsley grant is that funds for capital expenditures and operations are funded at 100% in year one, but only 66% in year two and 33% in year three. As such, the sustainability of this project needs to be a core element of planning and operations from day one.

Year One - Much of the grant budget in year one is dedicated to purchase of the three trucks and manikin suites (\$2,240,000). Operations funding in **year one** includes:

- PME administration, instructor salaries, etc. – app. \$60,000/month (the Dakotas utilize a paramedic/nurse team for each truck)
- Instructor & education development - \$44,000
(additional funding is available to have ND bring in training that they provide their staff relative to the trucks, simulation education and manikins)
- Training/travel to national simulation conferences and meetings - \$12,000
- Training/Travel expenses - \$35,000
- CME – \$25,000
- Truck storage - \$25,000/truck (year one only)
- Supplies for trucks – app. \$100,00 (year one only)
- Marketing - \$10,000
- Program evaluation - \$10,000

** Depending upon the PME proposal, funding shifts among categories is possible. Helmsley approval will be required

Year two funding includes:

- PME administration, instructor salaries, etc. – app. \$42,000/month
- Instructor & education development - \$30,000
- Training & travel to conferences & meetings - \$8,000
- Training/Travel expenses - \$44,000
- Supplies - \$7,000
- Program evaluation - \$6,700

Year three funding includes:

- PME administration, instructor salaries, etc. – app. \$22,000/month
- Instructor & education development - \$15,000
- Training & travel to conferences & meetings - \$4,000
- Training/Travel expenses - \$20,000
- Supplies - \$4,000
- Program evaluation - \$3,300

3.1.9 PME Role and Assumptions

The successful PME will be contracted by and answerable to MobileSim Montana, in particular, the board of directors of Simulation in Motion, Inc. However, due to the nature of this project's grant (with annually decreasing funding) and the startup decisions that need to be made in the next few years, there will be a symbiotic relationship between MobileSim Montana and the PME. MobileSim Montana is interested in engaging a PME that is not only interested in providing day-to-day delivery of simulation education, but also interested in advising and assisting MobileSim with sustainability planning of this initiative.

Additional thoughts a prospective PME should consider:

- To the extent possible through the PME contract and grant deliverables, the PME needs to actively advise MobileSim in developing a business plan, budget and ongoing sustainability plan.

MobileSim will not be interested in contracting with a PME that expects the board to singularly resolve the decreasing grant funding scheme.

- The PME will be responsible for hiring educators qualified in their fields and able to embrace the uniqueness of providing simulation education.
- In the Dakota programs, education staff also drive the trucks
- At least initially, these will be State-owned trucks and staff will need to be State employees when driving the trucks. It is currently our vision that education staff hired by the PME will also have a role driving the trucks to events. As such, these PME hires will also need to be eligible to be state employees. As a practical matter, when these staff are driving the trucks, they will be state staff and will be paid by the State for driving hours. When they are performing all other duties, they will be PME staff paid by the PME.
- PME staff will be responsible for developing a maintenance program for the trucks and manikins in a fashion that minimizes repairs as much as possible. The CAE manikins have a premium support package for three years.
- There is no requirement that staff be full-time or part-time. They will likely be busier in the summer months and not as busy in winter months when travel may be more limited.
- Initially, little development of scenarios should be necessary. The CAE manikins come with a package of scenarios they have developed and CAE will provide initial training to PME staff. The North Dakota program has developed at least a couple dozen scenarios that will be provided to our program.
- Strategic placement of the trucks needs to be considered. Limited funds are available in the first year for truck storage (\$25,000/truck).
- The PME will be responsible for development of program evaluations. This includes demonstrating that the program meets the student needs, but also demonstrates success of the program overall. Evaluation of how the program can show improved patient outcomes should be considered where possible.
- Depending upon the PME's proposal and expertise, they will be responsible for maintenance of a program website and other communication and marketing strategies.

3.2 MINIMUM RESPONSE REQUIREMENTS

All subsections of Section 3.2 require a response. Restate the subsection number and the text immediately prior to your written response.

NOTE: Each item must be thoroughly addressed. Prospective PMEs taking exception to any requirements listed in this section may be found nonresponsive or be subject to point deductions.

SCOPE OF SERVICES

Following are general specifications for project management activities that will assure MobileSim Montana meets the deliverables of the grant; the needs of the recipients of the simulation education; and the sustainability of the project.

The PME will have the responsibility to provide qualified administrative, educational and support staff to operate the MobileSim program within the staffing levels and budget approved by the Board. This includes selection and management of staff, program services, administrative services, supplemental programs (if any) and all other services described in a contract.

The prospective PME shall describe how it proposes to meet each of these general functional requirements.

3.2.1 Administrative Services / Support Staff - Prospective PME will describe their proposals relative to program administrative and support staff including:

- 3.2.1.1 What administrative staff does the prospective PME propose for MobileSim operations?
- 3.2.1.2 What support staff does the PME propose (vehicle drivers, manikin and vehicle maintenance, scenario development staff)?
- 3.2.1.3 How will support staff be selected, trained and managed?
- 3.2.1.4 Will support staff be full-time or part-time?
- 3.2.1.5 How will support staff salaries and other employment factors be determined in order to assure long term continuity of employment?

3.2.2 Educators - Prospective PME will describe their proposals relative to program educators including:

- 3.2.2.1 How will the PME determine educator competence in their profession and medical subjects?
- 3.2.2.2 How will the PME determine staff competence as educators?
- 3.2.2.3 Will the PME utilize full or part-time staff?
- 3.2.2.4 How will the PME provide training in educational methods, curriculum and simulation education to education staff?
- 3.2.2.5 How will educator performance be evaluated?
- 3.2.2.6 How will educator staff salaries and other employment factors be determined in order to assure long term continuity of employment?

3.2.3 Simulation Program Management - Prospective PME will describe how it proposes to implement simulation education including:

- 3.2.3.1 How will the program utilize principles of education and adult learning to provide educational experiences for a range of novice to experienced students?
- 3.2.3.2 How will the program deliver education to increase health care team performance?
- 3.2.3.3 How will the program ensure integration of current research/ literature, industry best practice and evidenced-based care in simulated learning activities?
- 3.2.3.4 How will education be aligned with EMS, hospital and other user needs?
- 3.2.3.5 How will education be aligned with state goals and initiatives?
- 3.2.3.6 How will delivery of education across communities and different sectors be standardized and consistent?
- 3.2.3.7 How will the PME manage all aspects of the operation, trouble-shooting, maintenance and repair of the simulation manikins and associated computer and electrical components?

3.2.4 MobileSim Vehicles – Storage, security and maintenance of the three MobileSim vehicles will be an essential goal of the project. The grant includes \$25,000 per truck in year one towards storage expenses. The Prospective PME will describe their proposals including:

- 3.2.4.1 What will the PME consider and recommend to MobileSim relative the strategic placement and storage of MobileSim vehicles?
- 3.2.4.2 How will the PME assist MobileSim to effectively utilize limited funds (\$25,000 in year one) to secure long-term storage of the vehicles?
- 3.2.4.3 How will the PME manage aspects of the operation, trouble-shooting, maintenance and repair of the MobileSim trucks and associated components to minimize expenses?
- 3.2.4.4 How will the PME maximize and prioritize scheduling of the simulation units?

3.2.5 Operations, Capital Budget and Financial Sustainability - Prospective PME will describe how it will be a collaborative partner in providing recommendations to the board relative to managing and developing the long term business sustainability of MobileSim including:

- 3.2.5.1 How will the prospective PME assist the board developing an annual budget, to report expenses on a regular basis and to project expenses/income statements for a budget year?
- 3.2.5.2 How can the PME collaborate on development of a business plan which incorporates the sliding decrease in grant funding annually and the sustainability with other funds beyond grant funding?
- 3.2.5.3 How will the PME negotiate board-approved agreements, contracts or MOUs with EMS services, hospitals and other customers to facilitate sustainability?
- 3.2.5.4 How will the PME work with the board to promote and expand MobileSim's presence and capacity as budget and staff allow?
- 3.2.5.5 How will the PME identify and pursue grants/sponsorship funding opportunities for program support?

3.2.6 Partnerships / Community Collaboration / Public Information

- 3.2.6.1 What role will the PME fill in providing marketing and other communications to educate stakeholders and customers about the program?
- 3.2.6.2 What role will the prospective PME play with producing and distributing information, education and reports to customers, stakeholders and the public to elicit general and financial support for the MobileSim project?

3.2.7 Evaluation

- 3.2.7.1 What quantitative measures will the PME develop and track to measure program activities and success?
- 3.2.7.2 What qualitative measures will the PME develop and track to measure student or entity (EMS services / hospitals) satisfaction with the training?
- 3.2.7.3 What measures will the PME develop and track to measure increased student knowledge and skills due to simulation training?
- 3.2.7.4 What measures will the PME develop and track to measure overall success and value of the MobileSim project?

SECTION 4: PME QUALIFICATIONS

Sections of 4.2.1 and 4.2.2 require a response. Restate the subsection number and the text immediately prior to your written response.

4.1 MOBILESIM'S RIGHT TO INVESTIGATE AND REJECT

MobileSim may make such investigations as deemed necessary to determine the prospective PME's ability to perform the services specified. MobileSim reserves the right to reject a proposal if the information submitted by, or investigation of, the prospective PME fails to satisfy MobileSim's determination that the prospective PME is properly qualified to perform the obligations of the contract. *This includes MobileSim's ability to reject the proposal based on negative references.*

4.2 PROSPECTIVE PME QUALIFICATIONS

To enable MobileSim to determine the capabilities of the prospective PME to perform the services specified in the RFP, the offeror shall respond to the following regarding its ability to meet MobileSim's requirements.

4.2.1 References Prospective PME shall provide a minimum of three references that are currently using or have previously used education and management services of the type proposed in this RFP. At a minimum, the PME shall provide the company name, location where services were provided, contact person(s), contact telephone number, e-mail address, and a complete description of the services provided, and dates of service. These references may be contacted to verify offeror's ability to perform the contract. MobileSim Montana reserves the right to use any information or additional references deemed necessary to establish the ability of the offeror to perform the contract. Negative references may be grounds for proposal disqualification.

4.2.2 Company Profile and Experience Prospective PME shall provide documentation establishing that the entity or company submitting the proposal has the qualifications and experience to provide the services specified in this RFP, including, at a minimum a general description of the firm including its primary source of business, organizational structure and size, number of employees, years of experience performing services similar to those described within this RFP.

4.2.3 Interview Prospective PME must be prepared to have key personnel assigned to this project complete an interview in Helena, Montana. MobileSim Montana reserves the right to have presentations from all Prospective PMEs who are deemed to have a passing score prior to the presentation process.

SECTION 5: COST PROPOSAL

5.1 COST PROPOSAL

MobileSim recognizes that this is a new project with numerous factors that MobileSim Montana and the PME will need to negotiate for an actual contract. Additionally, there are grant constraints on the amount of funds available in certain categories as noted in the budget assumptions in Section 3.1.4.

5.1.1 – PME Operations Proposal

- Prospective PME will submit a proposal for the monthly and other additional costs for the PME's performance of day-to-day operations of the mobile simulation project. The proposal shall be inclusive of:
 - PME's administrative costs for staff, office, phone, etc.
 - PME's costs for educator's (nurse-paramedic team or alternative staff proposal). Costs include salaries, benefits and other administrative costs
 - PME's proposal for other staff or administrative costs, if applicable.

Additional PME Budget Items

- Within the limits of funding and specific grant line items, other costs that will be added to the successful PME's budget and contract in addition to the above costs include:
 - Travel funds to support motel, per diem, fuel and other travel expenses
 - Travel funds to support educator training including from CAE and North Dakota Star.
 - Board approved travel funds to national simulation conferences or meetings as appropriate
 - Student CME
 - Marketing / education / information
 - Evaluation
 - Maintenance and repairs

5.1.2 – Cost Proposal Scenario

Similar to the Dakota projects, a primary goal of the Helmsley grant is to provide simulation education to EMS services and hospitals. Attachment A shows the 58 hospitals and 120+ ambulance services who will be the principle recipients of simulation education. Additionally, to support other request and the long-term sustainability of the project, mobile simulation will be offered to other customers. As much as possible, these requests may provide indispensable income to the project.

Prospective PME will provide an explanation or narrative on how it will advise the board on development of proposals for income opportunities. For this proposal, assume that a prospective customer is requesting MobileSim drive to their location and utilize the paramedic/nurse team for a specified 4-hour simulation education session. While actual travel, fuel and other expenses are yet unknown, describe in as much detail as possible how you would develop a standardized price structure for such requests.

SECTION 6: EVALUATION PROCESS

6.1 BASIS OF EVALUATION

The MobileSim evaluation committee will review and evaluate the offers according to the following criteria based on a **total number of 1,445 points**.

The **Ability to Meet the Scope of Services, References, Company Profile and Experience, and Interview** portions of the proposal will be evaluated based on the following Scoring Guide.

SCORING GUIDE

In awarding points to the evaluation criteria, the evaluation committee will consider the following guidelines:

Superior Response (95-100%): A superior response is an exceptional reply that completely and comprehensively meets all of the requirements of the RFP. In addition, the response may cover areas not originally addressed within the RFP and/or include additional information and recommendations that would prove both valuable and beneficial to MobileSim.

Good Response (75-94%): A good response clearly meets all the requirements of the RFP and demonstrates in an unambiguous and concise manner a thorough knowledge and understanding of the project, with no deficiencies noted.

Fair Response (60-74%): A fair response minimally meets most requirements set forth in the RFP. The proposed PME demonstrates some ability to comply with guidelines and requirements of the project, but knowledge of the subject matter is limited.

Failed Response (59% or less): A failed response does not meet the requirements set forth in the RFP. The proposed PME has not demonstrated sufficient knowledge of the subject matter.

6.2 EVALUATION CRITERIA

A MobileSim committee will evaluate submitted proposals on the basis of the criteria areas below. The committee will then make a qualifications-based recommendation for a final award decision. Generally, the selection committee will consider the prospective PME's overall suitability to provide the required services within the project's time, budget and operational constraints, and it will consider the comments and/or recommendations of the prospective PME's previous clients, as well as other references.

MobileSim Montana may consider and select proposals based upon factors other than a low bid. MobileSim may accept or reject any or all responses, and to offer an award that is in its best interest.

Responses found to be technically or substantially non-responsive at any point in the evaluation process will be rejected and not considered further. MobileSim Montana reserves the right to reject any or all responses submitted and to waive informalities in any proposed PME submission.

Criteria	Section of RFP	Point Value
3.2.1 Administrative Services / Support Staff	7% of points for a possible 100 points	
1. What administrative staff will the PME have	3.2.1.1	25
2. What support staff will the PME have	3.2.1.2	25

Criteria		Section of RFP	Point Value
3.	How will support staff be selected, trained and managed	3.2.1.3	25
4.	Will support staff be full-time or part-time	3.2.1.4	15
5.	How will staff salaries and other factors be determined	3.2.1.5	15

3.2.2 Educators	9% of points for a possible 130 points
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6.	How will the PME determine educator competence in their field	3.2.2.1	25
7.	How will the PME determine staff competence as educators	3.2.2.2	25
8.	Will the PME hire full-time or part-time staff	3.2.2.3	15
9.	How will the PME provide training on educational methods, curriculum	3.2.2.4	25
10.	How will educator performance be evaluated	3.2.2.5	25
11.	How will educator salaries and employment factors be determined	3.2.2.6	15

3.2.3 Simulation / Education Management	8% of points for a possible 115 points
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12.	Use principles of education and adult learning from novice to experts	3.2.3.1	25
13.	How will education increase team performance	3.2.3.2	15
14.	Integration of current research, best practice and evidence into learning activities	3.2.3.3	15
15.	Education aligned with EMS, hospital and other user needs	3.2.3.4	15
16.	Education aligned with State goals	3.2.3.5	15
17.	How will education across communities and state be standardized	3.2.3.6	10
18.	How will the PME manage manikin maintenance and repairs	3.2.3.7	20

3.2.4 MobileSim Vehicles	6% of points for a possible 90 points
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19.	Determination for strategic placement of trucks	3.2.4.1	30
20.	Determination for use of truck storage funds	3.2.4.2	20
21.	Management of operation, trouble-shooting, maintenance of trucks	3.2.4.3	25
22.	How will the PME maximize and prioritize scheduling of trucks	3.2.4.4	15

3.2.5 Operations, Capital Budget, Sustainability	7% of points for a possible 100 points
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23.	How will PME assist board with developing an annual budget	3.2.5.1	20
24.	How will PME collaborate on development of a business plan	3.2.5.2	20
25.	How will PME negotiate contracts / MOUs with customers	3.2.5.3	20
26.	How will PME work with the board to promote and expand MobileSim's presence and capacity	3.2.5.4	15
27.	How will PME pursue grants and partnership funding	3.2.5.5	25

3.2.6 Partnerships / Community Collaboration / PI	3% of points for a possible 40 points
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28.	PME role to provide marketing and other communications	3.2.6.1	20
29.	PME role with distributing education and reports about MobileSim	3.2.6.2	20

3.2.7 Evaluation	7% of points for a possible 95 points
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30.	Quantitative measures	3.2.7.1	20
31.	Qualitative measures re: student or entity satisfaction	3.2.7.2	20
32.	Qualitative measures re: student knowledge and skill performance	3.2.7.3	30
33.	Measures re: overall success and value of the project	3.2.7.4	25

Criteria		Section of RFP	Point Value
4.1 Offeror Qualifications		28% of points for a possible 370 points	
34.	Reference #1	4.2.1	40
35.	Reference #2	4.2.1	40
36.	Reference #3	4.2.1	40
37.	Company Profile and Experience	4.2.2	50
38.	Interview	4.2.3	200
Cost Proposal		28% of points for a possible 400 points	
39.	Cost Proposal	5.1.1	300
40.	Cost Scenario	5.1.2	100

Lowest overall cost for 5.1.1 receives the maximum allotted points. All other proposals receive a percentage of the points available based on their cost relationship to the lowest. Example: Total possible points for cost are 300. Offeror A's cost is \$20,000. Offeror B's cost is \$30,000. Offeror A would receive 300 points. Offeror B would receive 201 points ($\$20,000/\$30,000 = 67\% \times 300 \text{ points} = 201$).

$$\frac{\text{Lowest Responsive Offer Total Cost}}{\text{This PME's Total Cost}} \times \text{Number of available points} = \text{Award Points}$$

SECTION 7: CONTRACT AWARD

7.1 CONTRACT NEGOTIATION AND AWARD

7.1.1 Discussions and Interviews

After evaluation of the proposals received in response to the RFP, MobileSim Montana will engage in individual discussions and interviews with two or more proposers deemed fully qualified, responsible and suitable on the basis of initial responses, and with professional competence to provide the required services. Repetitive interviews are permitted.

Proposers shall be encouraged to elaborate on their qualifications, performance data, and staff expertise relevant to the proposed contract.

7.1.2 Proprietary Information

Proprietary information from competing proposers (including any data on estimated man hours or rates and the plan for accomplishing the scope of work) will not be disclosed to the public or to competitors, provided such information is duly marked as "Proprietary Information" by the PME.

7.1.3 Negotiations

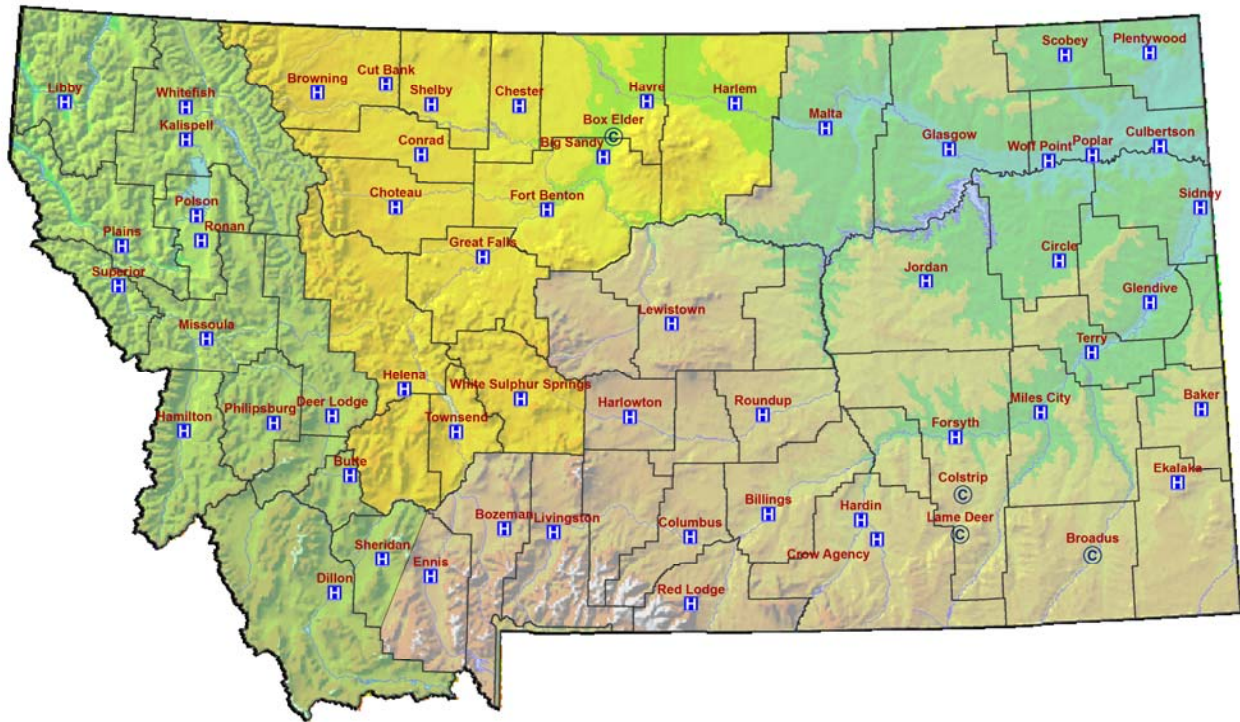
At the conclusion of the interviews and on the basis of evaluation factors set forth in Section 6 as well as information provided and developed in the selection process to that point, MobileSim will rank, in the order of preference, the interviewed proposers whose professional qualifications and proposed services are deemed most meritorious.

Negotiations shall then be conducted with the PME ranked first. If a contract satisfactory and advantageous to MobileSim can be negotiated at a fee considered fair and reasonable, the award shall be made to that PME. Otherwise, negotiations with the PME ranked first shall be formally terminated and negotiations conducted with the PME ranked second, and so on, until a contract can be negotiated at a fair and reasonable fee.

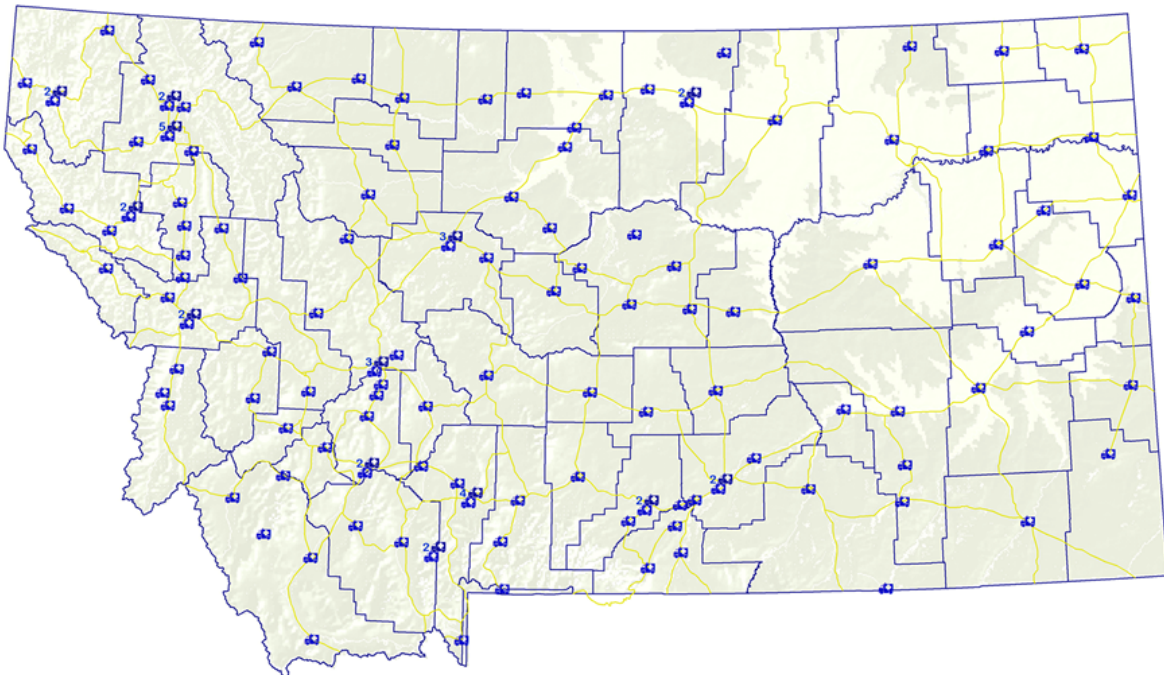
Should MobileSim determine in writing and in its sole discretion that only one PME is fully qualified, or that one offer is clearly more highly qualified and suitable than the others under consideration, a contract may be negotiated and awarded to that PME.

Attachment A

Montana Hospitals



Montana Ambulance Services



APPENDIX B: EXAMPLE CONTRACT DELIVERABLES

As a final step in the selection of a successful PME through the RFP process, MobileSim Montana and the PME will negotiate a contract describing typical contract agreements, payments and considerations. Negotiation and agreement on the contract will include this section on Services to be Provided. That section may include the following:

Section: SERVICES TO BE PROVIDED

- A. The PME will have broad responsibilities to assist MobileSim Montana in the development and implementation of a mobile simulation education program in Montana. Activities include, but are not limited to:
1. Provide necessary activities related to acquiring qualified educational staff for delivery of the mobile simulation education. This includes:
 - a. Development of job descriptions, interview and selection process for paramedic and nurse educators
 - b. Assist MobileSim with development of vehicle driver job descriptions (trucks will be State vehicles and staff will be State employees while driving vehicles)
 - c. Selection and hire of at least core staff within <30> days of activation of contract. (one paramedic / nurse team equivalent for each truck)
 - d. Develop educator evaluation programs (e.g. self-evaluation, student evaluation) and implement with all education events
 - e. Develop student evaluation systems that can be provided to students at education events.
 2. Provide necessary activities related to operation and maintenance of the simulation manikins and related electrical components and computers.
 - a. Coordinate scheduling with CAE to visit Montana to orient education staff on manikin orientation as soon as core staff are hired.
 - b. Following CAE orientation, coordinate with North Dakota Star program to provide their education on simulation education, delivery of scenarios and vehicle operations.
 - c. Develop written startup and shutdown procedures for all manikins and electronic components, including storing and securing for transport.
 - d. Develop and implement written SOPs for checking equipment before and after an education event.
 - e. Develop policies and check sheets related to routine maintenance of the manikins and related electronics.
 3. Provide necessary activities related to operation and maintenance of the mobile simulation trucks.
 - a. In concert with job description developed under (1)(a), develop training, orientation and procedures for all drivers.
 - b. Develop and implement policies related to vehicle driving and safety procedures (weather and road considerations, driving speeds, backing procedures, etc.)
 - c. Develop and implement policies and check sheets related to pre-trip and post-trip vehicle check procedures include securing of all equipment and supplies, compartments, vehicle safety and damage checks, accident reports, etc.
 - d. Develop and implement policies and documentation related to routine maintenance of the trucks and associated equipment.

4. Perform necessary administrative activities relative to MobileSim program operations, budgets, and sustainability.
 - a. Attend quarterly and other appropriate board meetings; provide requested reports on mobile simulation activities, challenges and successes.
 - b. At least quarterly and as requested, provide MobileSim reports on expenses, income and budget projections. Assist the board in development of an annual budget.
 - c. Assist the board as requested with development of a business and sustainability plan.
 - d. As requested, negotiate board approved agreements, contracts or MOUs with customers.
5. Provide functions related to marketing, developing partnerships, communicating and providing education.
 - a. Maintain a project website.
 - b. Develop local community or state news releases and other media to educate stakeholders and the public about the program.
 - c. Develop marketing and information materials for conferences, meetings and other events.
 - d. Develop reports and other information about project activities and progress.
6. Provide necessary evaluation support.
 - a. Provide regular quantitative reports for the board (e.g. number of training events, number of students, etc.)
 - b. Provide regular qualitative reports for the board (e.g. student, EMS service or hospital satisfaction).
 - c. Develop and report to the board measures that describe changes in student knowledge and/or performance from the training.
 - d. Prepare reports to the board on overall measures of project success
7. Annually, schedule and provide onsite education to each of the approximately 58 hospitals at least once.
8. Annually, offer the 120+ ambulance services and their associated non-transporting units simulation education. As much as possible, EMS service training can be coordinated with hospital training locations and times.
9. As requested, offer mobile simulation education or promotional events for up to three provider conferences (EMS, nursing, multi-provider)
10. As time and budget allows, provide other requested educational or promotional events (additional duties to be specified in contract modifications or SOW agreements).

APPENDIX C: RFP RESPONSE FORM

1. Offeror must provide a signed copy of the RFP Cover Sheet.

PME MUST PROVIDE THE FOLLOWING INFORMATION THAT WILL BE EVALUATED BY THE RFP EVALUATION COMMITTEE:

2. Ability to Meet Project Requirements (Section 3).
3. References (Section 4.2.1).
4. Company Profile and Experience (Section 4.2.2).
5. Cost Proposal (Section 5.0).
6. **Completeness of Proposal.** A PME's response must be complete at the time of submittal and contain all the reference materials necessary to provide a complete response to the RFP. Unless specifically requested in the RFP, an PME making the statement "Refer to our literature..." or "Please see www.....com" may be deemed nonresponsive or receive point deductions. If making reference to materials located in another section of the RFP response, specific page numbers and sections must be noted. **The Evaluation Committee is not required to search through literature or another section of the proposal to find a response.**
7. **Copies Required and Deadline for Receipt of Proposals.** PME must submit **one original proposal and three (3) copies** to the MobileSim contact. MobileSim reserves the right to request an electronic copy of the RFP response.

EACH PROPOSAL MUST BE SEALED AND LABELED ON THE OUTSIDE OF THE PACKAGE clearly indicating it is in response to the **MobileSim RFP**. *Proposals must be received at the reception desk of MMA prior to 2:00 p.m., Mountain Time, April 21, 2017. PME is solely responsible for assuring delivery to the reception desk by the designated time. Facsimile or electronic submissions are not acceptable.*

Mailing Address:
MobileSim Montana
Montana Medical Association
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